

Individual Tax Documents

Paperwork Checklist

- Last year's tax return (all schedules)
- Income documents:
 - W-2's
 - 1099's
 - K-1's
 - 1099 SSA
- Banking information
 - 1099-int
 - 1099-R
 - 1099-Div
 - Tax package from all brokerage accounts
- Estimated Tax Payments for the year
 - Q1: _____
 - Q2: _____
 - Q3: _____
 - Q4: _____
- For each dependent:
 - Name
 - Social Security Number
 - Date of Birth
 - Relationship to primary and/or secondary taxpayer
 - Days living in the same address as the primary or secondary taxpayer
 - Document showing dependents address as same as primary and/or secondary taxpayer
 - Can anyone else claim them as dependent
- Form 1098 (mortgage interest paid statement)
- Form 1098-E (student loan interest paid)
- Charitable contribution records (Should include amount and name of the organization)
- If you have a 1099 or self-employment income:
 - Total income from 1099 or self-employment
 - Business expenses
 - Health insurance cost
 - Beginning and end-of-year inventory
 - Milage
 - Home office:
 - Own or Rent: _____
 - Total sqft of home; _____
 - Total Sqft of office: _____
- If you own a rental property:
 - Total rent collected for each property
 - Rental expenses broken out for each property
 - Health insurance cost
 - If any property was bought or sold, include the purchase/sales date and price
 - Milage